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ABSTRACT

This training journal, a product of the Career Information Delivery Systems (CIDS) Project, is designed to provide trainers with the necessary training delivery skills needed to create effective adult learning experiences. Addressed in the individual units of the journal are the following topics: basic elements of training experiences (content and process observers); change agentry (five major orientations toward change); training program design and evaluation (issues in defining a training need, the identification of training needs, and a methods primer); and conducting training (a training session checklist and five major steps involved in conducting training). Each unit contains a central objective, terminal objectives, instructional text, and exercises. (MN)

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A SYSTEMATIC APPROACH TO IMPROVING THE TRAINING PROCESS IN CIDS

TRAINING JOURNAL

ED239099

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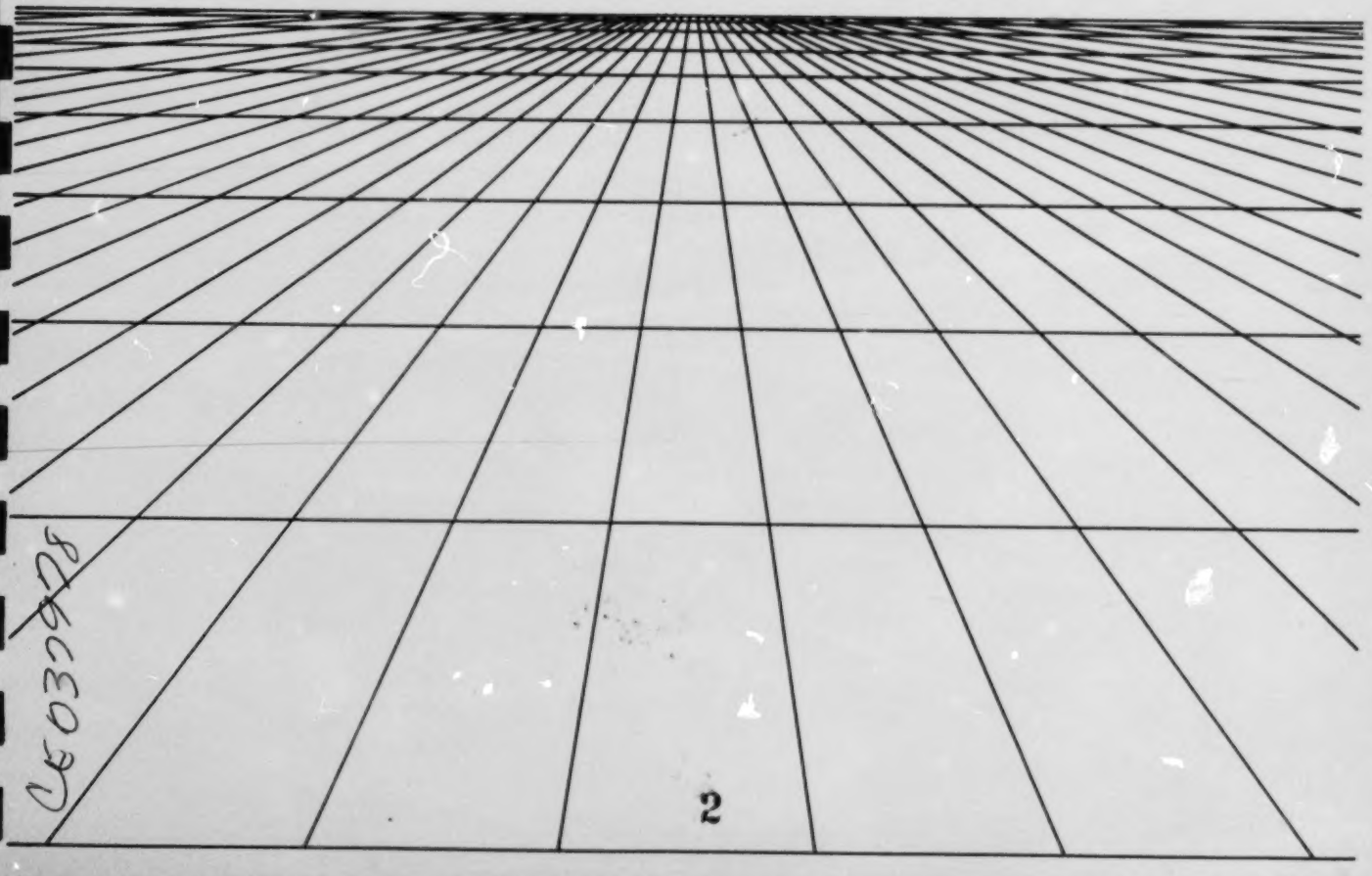

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William M. Woolley, Chairperson
April 8,9,10, 1981

at

American Personnel and Guidance Association 1981 Convention
Ramada Inn Airport
St. Louis, Missouri

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Ted Bruce has had fifteen years experience in counseling, counselor development, and staff training. He was a key contributor in the development of the Department of Labor's Competency Based Counselor Training Program which is currently being implemented in 37 states. For several years he served as a training manager for the Florida Department of Health and Rehabilitative Services. He is currently the State Counseling Specialist for the Florida Department of Labor.

Bill Woolley

Bill Woolley is the Executive Director of the Center for Career Development Services, Florida Department of Education. CCDS is a consortium of programs and products designed to deliver a wide range of career/occupational information to all Florida citizens. Before coming to Tallahassee in 1977, Bill was a program administrator for a nine-county educational consortium. His responsibilities included coordinating all inservice activities for media specialists, guidance counselors and vocational education instructors for the nine member districts and developing and expanding FLORIDA VIEW state wide. He was cited four years in a row by his peers for the quality of his inservice programs including content, activities and consultants.

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INTRODUCTION TO THE TRAINING THE TRAINERS CONFERENCE

Many training programs designed to prepare trainers for their role in maximizing learning teach technical skills without developing the necessary training delivery skills needed to create effective adult learning experiences. The experiential training conference you are participating in is designed to help you develop and sharpen your skills in planning and delivering training experiences for adults. An emphasis in this training conference is on learning through doing, as well as on the acquisition of information.

Experience in training of this nature has indicated that a TRAINEES JOURNAL helps learning in such an intense, event-packed program. This TRAINEES JOURNAL was designed specifically for your use in training and has the following functions:

1. It provides materials you will need in many of the activities.

2. It will help you organize many of your feelings and reactions.

3. It provides a means through which the trainers can receive feedback on the strengths of the program as well as its weaknesses.

4. It provides a written summary of significant events and information that you may keep and use following completion of the training.

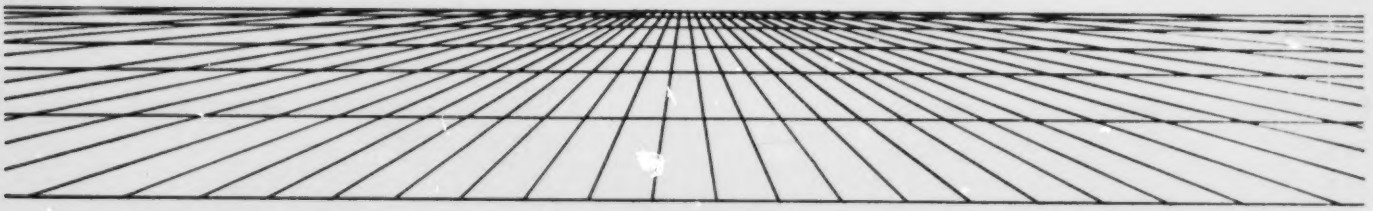
In general, consider the JOURNAL as an aid in your training and as something that you will find useful following this conference. You should keep in mind that the JOURNAL provides a means for YOU to record YOUR experiences in the training. Honesty and openness with yourself will help make this training a positive experience.

Since you have had previous communication about the purpose and specific objectives for this conference, it is understood that you chose to attend because you anticipate that the experience will fit well with your current needs and interests.

We expect that your individual level of interest and participation in the variety of activities which are offered as part of this conference design will vary according to your own individual choices. However, please do not sleep through more than 25 percent of the scheduled training time.

UNIT 1

Basic Elements of Training Experiences



UNIT I. BASIC ELEMENTS OF TRAINING EXPERIENCES

The major purpose of this unit is to establish a positive learning environment and to introduce and explore dimensions of adult learning in training and other situations.

Upon completion of this unit, participants will:

1. Have established a positive environment for learning.
2. Understand the goals and objectives of the workshop.
3. Be able to discriminate between training, education and other user specialist roles.
4. Be able to identify fifteen positive and fifteen negative aspects of adult training experiences.
5. Be able to identify the specific characteristics of adults which must be considered in order to conduct successful training experiences.

BASIC ELEMENTS OF TRAINING EXPERIENCES

As I think of the very best training experiences I have participated in, I can identify the following five qualities of those experiences which I liked the most:

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

As I think of the very worst training experiences I have participated in, I can identify the following five qualities of those experiences which I did not like worth a damn:

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

The five most essential, positive qualities of training experiences which my group agreed upon are:

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

The five worst qualities of training experiences which my group agreed upon are:

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

Other qualities which I became aware of during group discussion:

_____

_____

_____

THE CONTENT OBSERVER

The function of the Content Observer is to observe and report on the effectiveness with which the group solves the problem it investigates. It is not enough to form just a general impression of the group's ability to think collectively. Instead, the Content Observer should record specific contributions which have an important effect on the quality of the decisions. The Content Observer ought, for example, to be able to describe instances of digression, report on the effect of summary statements, or cite specific consequences of lack of critical information.

The questions listed below may help to direct your attention to specific matters of content until you have developed criteria of your own.

1. Did the group ascertain quickly the exact nature of its problem?

2. Was the problem investigated in a logical and systematic manner?

3. At what points did digression occur? How serious were they? Who was responsible for them? How did the group recover?

4. Was sufficient information brought to bear on the problem? Were the facts or the sources tested for reliability? Was good use made of the information available to the group?

5. Did the group periodically summarize its conclusions so that the participants knew what had been covered and what issues remained to be settled? Were the summaries fair? accurate?

6. Did the group reason logically? Did you note any failure to do so? When, if ever, did the group resort to prejudice, name-calling, or exhortation as a substitute for thinking?

7. Was sufficient consideration given to unusual or unorthodox explanations or solutions?

8. Did the group make use of its findings in earlier stages of its deliberations when considering possible decisions?

9. Was there sufficient stimulation to keep the group concentrating on the problem? When did interest lag? Why?

10. Did you think that the final decisions reflected the best thinking of which this group is capable?

In reporting to the group, the Content Observer should select several of these (or other) questions for comment. He/she should not try to "cover the waterfront" by reading and attempting to answer all of them.

THE PROCESS OBSERVER

The function of the Process Observer is to observe and report on the psychological conditions under which the members of the group carry out their deliberations. Avoid merely forming a general impression of the way participants react to one another. Instead, follow the discussion closely and keep a record of specific attitudes and actions which influence group behavior. Such an observer ought, for example, to be able to report specific instances in which social pressure seemed to be exerted, in which antagonism may have resulted from the domination of one or more members, or where frustration followed from lack of opportunity to participate.

The questions listed below may help to direct your attention to specific process matters until such time as you develop criteria of your own.

1. In what kind of psychological "atmosphere" did the group work? Was it "permissive"--that is, did it encourage everyone to participate spontaneously and frankly?

2. Was sympathetic consideration given to all contributions? If not, why not?

3. Was there any evidence of the exertion of social pressure against any member of the group?

4. Did all the members of the group have an equal opportunity to participate? Did the group make the best use of its potential?

5. At what points did interpersonal tension exist? Why? What brought it about? How was it released, if at all?

6. Did you feel that some members were frustrated by the procedure followed?

7. Did you notice any members who frequently performed certain functions or played such roles as "Conciliator," "Blocker," "Clown" or "Initiator"?

8. Did the leadership of the group rest in one individual, or was it shared among members of the group? Who and how many participated?

9. Was the leadership autocratic or democratic in character? Was it consistent with the demands of the situation?

10. Do you believe that the members of the group were satisfied with their decisions? Satisfied with their leadership? Satisfied with their own contribution to the group?

The Process Observer should avoid reading and commenting on each of these questions when giving "feedback" to the group. He/she should select the most significant questions--or those questions with the most significant answers--for special comment.

NOTES: CHARACTERISTICS OF ADULTS RELATED TO TRAINING

LITERATURE SEARCH: ADULT LEARNING

Listed below are 76 statements regarding the adult as learner. The statements come from a wide variety of disciplines -- psychology, counseling, adult education, psychiatry, social work -- and, taken together, present various facets of adults in learning situations.

1. The effective trainer helps adults to actively set their own goals, and provides a variety of means and opportunities for intensive self-evaluation. (Aker)

2. The trainer actively shares, participates, and learns with the learners in the learning experiences. (Aker)

3. The effective trainer provides an atmosphere where adults are free to search through trial-and-error without fear of institutional or inter-personal threat. (Aker)

4. The trainer of adults arranges learning experiences so that the learners can integrate theory and practice. (Aker)

5. The less meaningful the material and the greater its difficulty and amount, the more superior is distributed practice. If material is simple, short, and meaningful, massing will produce superior learning. (Bass and Vaughan)

6. The less capable and less experienced the learner, the more he will benefit from distributed practice. The talented experienced learner may prefer massed practice. (Bass and Vaughan)

7. Relate learning activity to interesting, meaningful materials already studied outside the program. (Bass and Vaughan)

8. Provide feedback during learning showing the extent of progress toward final objectives. (Bass and Vaughan)

9. Items to be remembered together and in sequence must be presented that way. (Berelson and Steiner)

10. Make material to be learned as rhythmical as possible. (Berelson and Steiner)

11. The better something is learned in the first place, the longer it will be retained. (Berelson and Steiner)

12. Material previously learned and forgotten can be relearned with less effort than it took to learn it in the first place. (Berelson and Steiner)

13. The beginning and end of a series of items are memorized much more quickly than items in the middle. (Berelson and Steiner)

14. Learning curves often exhibit plateaus, or periods of relative standstill, before improvement resumes.

15. The brighter you are when young, the brighter you remain while aging. (Birren)

16. When general intelligence is held constant, there is no sex differences in learning power. (Bromley)

17. There is a high correlation between most socio-economic status indices and the acceptance of innovations. (Brunner)

18. The disuse of learning skills is apparently more explanatory for adult learning potential than ability to learn. (Brunner)

19. There seems to be a relationship between the "idea" to be learned and the process of learning it -- which may very well rest on an attitude change. (Brunner)

20. Capacity for comprehension, reasoning and judgement appears to be maintained at a relatively constant level as long as mental work and intellectual interests are continued. (Brunner)

21. There is a high correlation between years of schooling and learning. (Brunner)

22. The stronger the cohesiveness of a group of subordinates, the slower the acceptance of new practices and ideas. (Brunner)

23. Judgement and reasoning ability reach their peek latest of all abilities. (Donahue)

24. The effect of concept learning is to free the individual from control by specific stimuli. (Gagne)

25. The learner is progressively weaned from dependence on an external agent to dependence on himself. (Gagne)

26. The function of repetition is to overcome the effect of forgetting brought about by interference. (Gagne)

27. "Learning by doing" is better and more effective than learning from the printed or spoken word. (Gagne)

28. Learning depends on capacity. (Getzel)

29. Learning depends upon perceiving relevant relationships. (Getzel)

30. Most of the significant problems faced by the adult do not have "correct" answers. (Getzel)

31. There are stereotypes or institutionally patented solutions which are "correct" because they are traditional rather than rational. Adults are bound by these and modify them only under severe pressure. (Getzel)

32. Learning depends on active search for meaning. (Getzel)

33. Any solution an adult reaches to a problem is bound to have significant effects on others. (Getzel)

34. Adults usually come to learning problems already deeply committed to a point of view regarding significant matters at issue. (Getzel)

35. Eliminate inside or outside interfering noises during training sessions. (Hand)

36. Use visual aides freely with older more experienced trainees so that vision can supplement hearing. (Hand)

37. There are sociopsychological and biopsychological "turning points" or stages in an adult's life. Each stage affects the adult's learning potential. (Havighurst)

38. Use short periods of practice with difficult tasks, with younger, unexperienced learners, and in the early stages of learning. (Hunter)

39. Adult learners must be free to influence the character and direction of the problem-solving and task interactions of the training group whenever they possess the skill and inclination to do so. (Jensen)

40. Objectives, interests and needs of clientele must be taken into account when planning training for adult programs. (Jensen)

41. The instructional and evaluation procedures used in training adults must be assessed and then accepted or rejected by the trainees themselves to whatever degree they possess knowledge and skills to make these decisions. (Jensen)

42. The gratifications or rewards adults experience in formal instruction situations must result primarily from the acquisition of new behaviors rather than from gratifications received from prestige, influence, and friendship interactions. (Jensen)

43. Adults can evaluate their own progress toward learning goals. (Knowles)

44. Children see themselves as dependent persons whereas adults see themselves as responsible, self-directing personalities. (Knowles)

45. Adulthood is a developmental period with developmental tasks which give rise to "teachable moments." (Knowles)

46. Adults engage in learning in response to pressures from current problems. (Knowles)

47. Adults can discover for themselves what they need to learn. (Knowles)

48. As people grow older, their attitudes become more firmly fixed, more stable. (Lorge)

49. There are no age barriers to learning. (McCormick)

50. The adult learner must have a clear picture of the behavior he is required to adopt. (Miller)

51. The trainee must have opportunities to practice appropriate behavior. (Miller)

52. There is a better preservation with age of the verbal as compared with the mathematical and manual functions. (Miles and Miller)

53. The adult learner is likely to be more rigid in his thinking. (NAPCAE)

54. Learning is facilitated in an atmosphere in which evaluation is a cooperative process with emphasis on self-evaluation. (Pine and Horne)

55. Learning is facilitated in an atmosphere which tolerates ambiguity. (Pine and Horne)

56. Learning is facilitated in an atmosphere which encourages people to be active. (Pine and Horne)

57. Learning is sometimes a painful process. (Pine and Horne)

58. Learning (behavioral change) is a consequence of experience. (Pine and Horne)

59. For adults, learning is the discovery of the personal meaning and relevance to ideas. (Pine and Horne)

60. The adult personality is in a dynamic state of flux. The continual expansion and construction of interests, needs and fears is reflected by participation rates and interests. (Pressy and Kuhlen)

61. Supervisors should be concerned with improving subordinates' competence in evaluating new ideas, not just with promoting innovations as such. (Rogers)

62. Subordinates must perceive a need for an innovation before it can be successfully introduced. (Rogers)

63. With few exceptions, liking for occupations decreases with age. (Strong)

64. Adults can learn throughout their lifetime. (Thorndike)

65. Age seems to influence the power of intellectual acquisition very much less than motor skill. (Thorndike)

66. Difficulty expected in learning at a late age is in part due to a sensitivity to ridicule. (Thorndike)

67. A new response is strengthened or weakened by the satisfaction or the annoyance which may accompany or follow. (Thorndike)

68. General learning ability between 25 and 35 is superior to childhood and equal to or superior to early adolescence. (Thorndike)

69. The existence of periodic plateaus in the rate of learning necessitates frequent changes in the nature of the learning task to insure continuous progress; therefore, techniques should be changed frequently in any given session. (Verner and Booth)

70. Comparisons among adults are odious and any measures of performance should be limited to successive measures of the individual's own performance. (Verner and Booth)

71. Learners progress in an area of learning only as far as they need to in order to achieve their purposes. With increased motivation, learning progress can continue. (Watson)

72. Opportunity for fresh, novel, stimulating experience is a kind of reward which is quite effective in learning. (Watson)

73. A decline in intelligence test performance is found in cross-sectional but not in longitudinal studies of adults. (Wechsler)

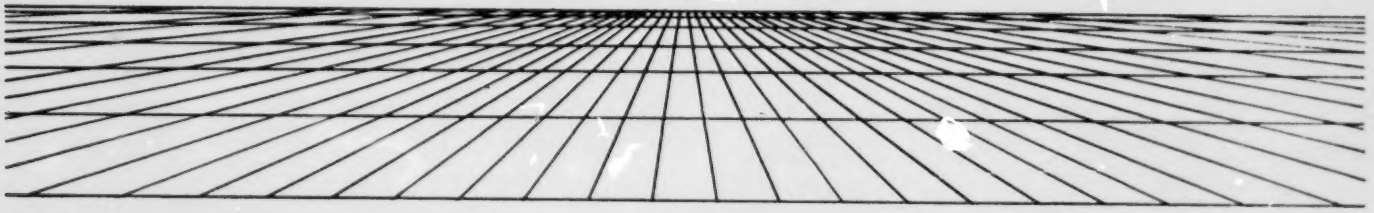
74. Adult teaching techniques and methods need to account for such factors as speed of learning, past experiences, motivation to learn and various physical conditions. (Zahn)

75. An older person's ability to perform well on an intelligence test depends on the type of test, his health, and his former education, not on his age. (Zahn)

76. Speed should also be considered in outside assignments; adults can do all that youth can, but usually take a little longer. (Zahn)

UNIT 2

Change Agentry: You Cannot Implement CIDS in a Vacuum



UNIT II. CHANGE AGENTRY: YOU CANNOT IMPLEMENT CIDS IN A VACUUM

The major purpose of this unit is to enable each participant to assess their own philosophy and approach to the induction of change in another person, agency, etc., and relate this assessment to the training task.

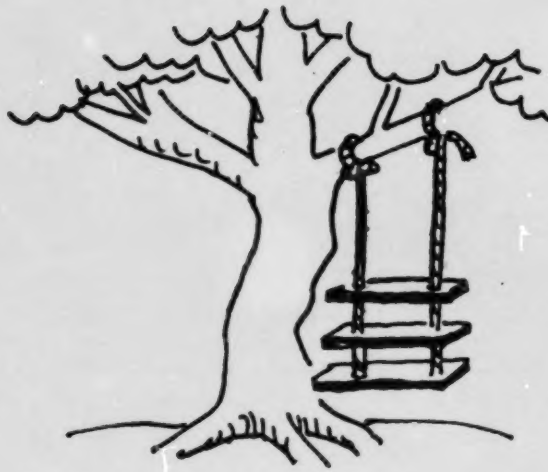
Upon completion of this unit participants will:

1. Be able to list and describe the five major orientations toward change which participants might employ.

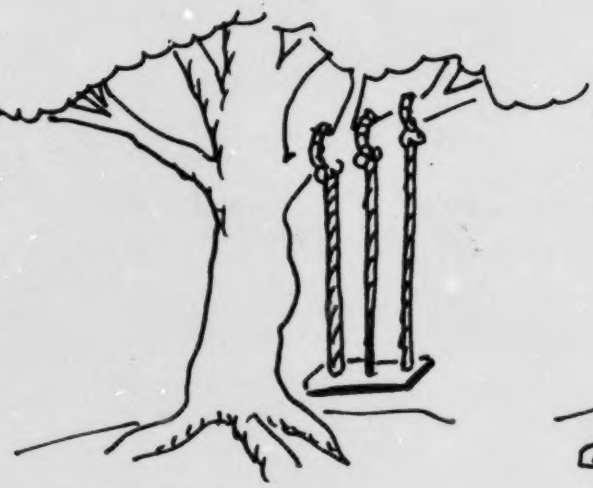
2. Be able to list and define the four major contributions of training as a vehicle for personal and organizational change.

3. Given a demonstration of a specific problem solving method, be able to select a CIDS implementation problem, discriminate between training and other strategies which might be brought to bear on the problem, and formulate a specific plan for resolution.

A CIDS PROGRAM



A) The State Agency Version

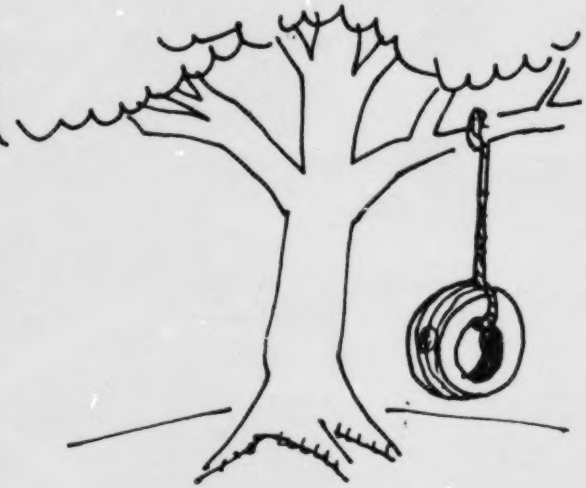


B) The CIDS Staff Version

C) As Bill Wholley described it to Bob Alexander

D) As Bob Alexander described it to Bill Wholley

Product of A Thru D



As the user wanted it

NOTES: PLANNING FOR CHANGE AND RESISTANCE TO CHANGE

NOTES: THE FIVE MAJOR ORIENTATIONS TOWARD CHANGE

1. CLIENT-CENTERED CHANGE:

2. CHARISMATIC CHANGE:

3. CHANGE VIA COMPLIANCE:

4. CUSTODIAL CHANGE:

5. CHANGE VIA CREDIBILITY:

NOTES: ROLES OF USER SPECIALISTS

The four major contributions of training as a vehicle for personal and organizational change are:

1.

2.

3.

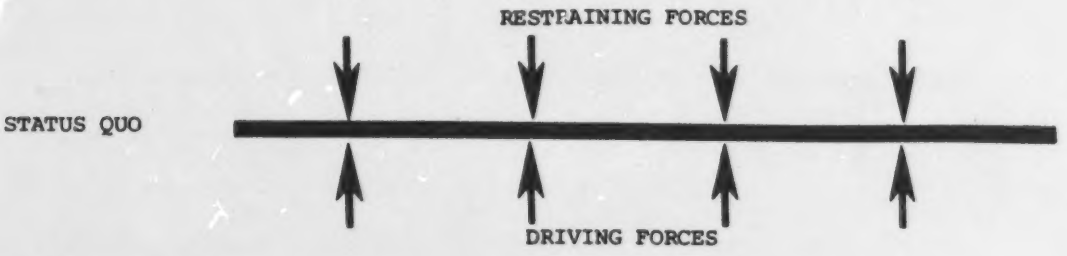
4.

FORCE FIELD ANALYSIS

Force Field Analysis is a systematic approach to problem analysis and planning.

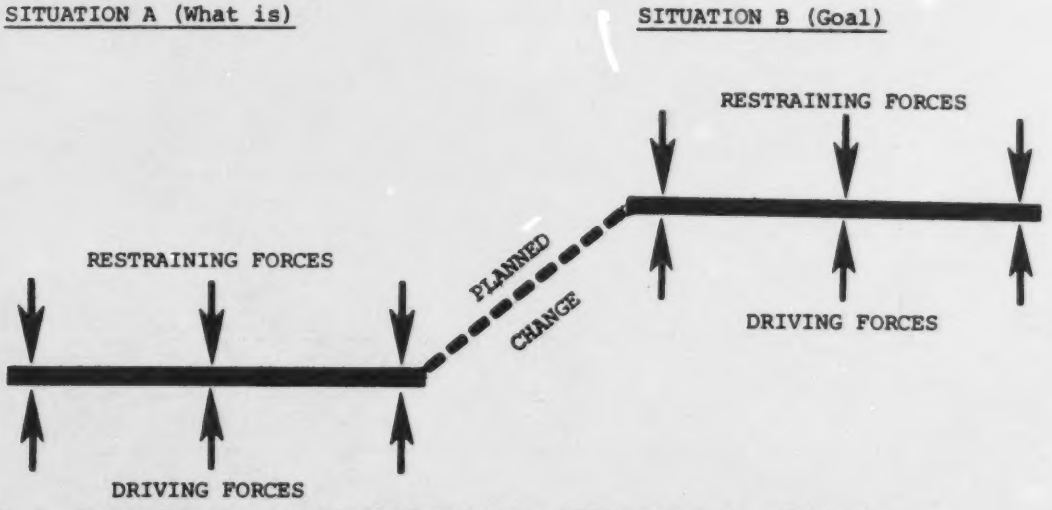
The basic concepts of Force Field are as follows:

The STATUS QUO of an existing situation is maintained by two kinds of forces that work against each other. These are called Driving Forces (positive forces) and Restraining Forces (negative forces). These are visualized as follows:



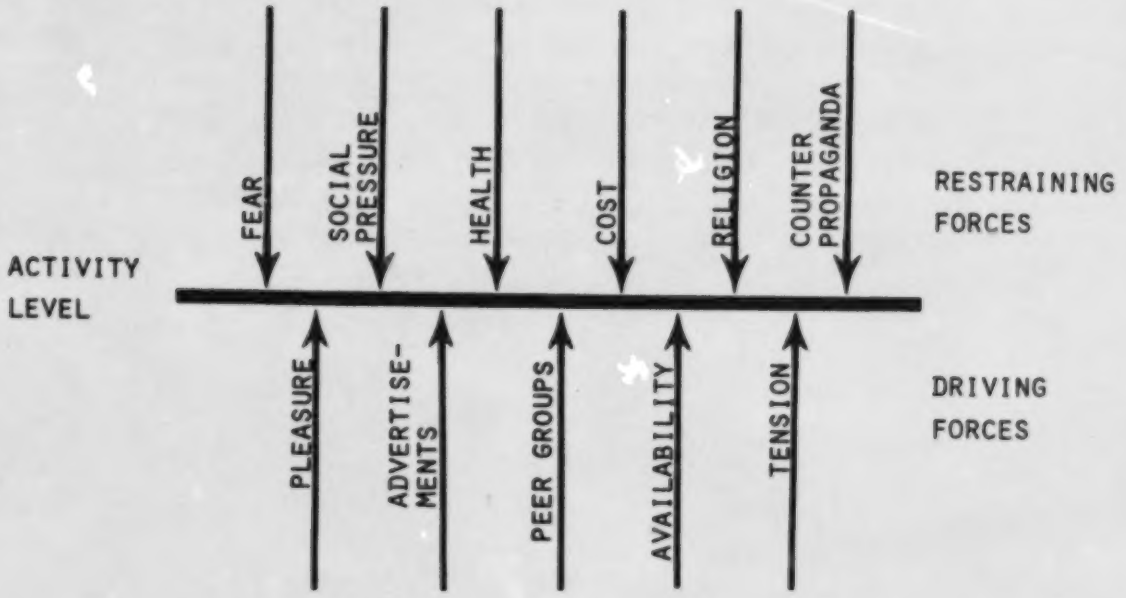
If this current situation with its specific driving and restraining forces is considered to be SITUATION A, it is possible to analyze those specific forces with a view toward creating a more desirable situation. This can be considered SITUATION B, or the GOAL.

Developing a plan of action to move from SITUATION A to SITUATION B can be visualized as follows:



It is important to note that if and when SITUATION B is achieved, it will represent a new STATUS QUO which will then be maintained by a new set of driving and restraining forces.

BELOW IS A SAMPLE GRAPH OF A FORCE FIELD ANALYSIS FOR SMOKING BEHAVIOR



ACTIVITY TYPE	ACTIVITY LEVEL: LOW	ACTIVITY LEVEL: HIGH
BAD	NO PROBLEM	WEAKEN DRIVING FORCES MAINLY
GOOD	WEAKEN RESTRAINING FORCES MAINLY	NO PROBLEM

FORCE FIELD ANALYSIS: A SYSTEMATIC APPROACH TO SOLVING A CIDS IMPLEMENTATION PROBLEM

I. Briefly describe the problem or situation that is of concern as it exists now. (Situation A)

II. Briefly describe the characteristics of the situation you would like to see exist. Be very specific and realistic. (Situation B, or Goal)

III. Briefly describe the positive or driving forces which will promote moving from Situation A to Situation B. (Make concise list.)

IV. Briefly describe the negative or restraining forces which will inhibit moving from Situation A to Situation B. (Make concise list.)

V. Review these lists (III and IV) and select those forces which can be acted upon and changed. Select driving forces that can be strengthened and used. Select restraining forces that can be modified and reduced. (Indicate with an *.)

VI. For each driving force selected, briefly outline some action steps which would increase the effects of the force.

VII. For each restraining force selected, briefly outline some action steps which might reduce the effects of the force or completely eliminate it.

VIII. Review these action steps (VI and VII) and select those which seem most promising for implementation. (Indicate with an *.)

IX. For each action step selected, list the materials, resources and people available or needing to be generated for carrying out the action.

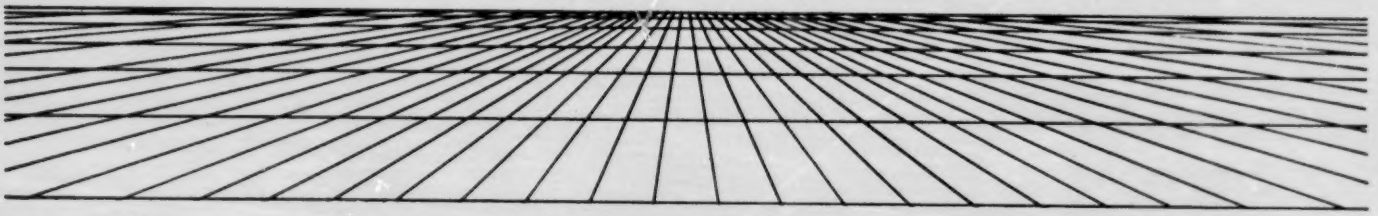
X. Review the lists of action steps and resources to consider how they might fit into an integrated, comprehensive action plan. Consider any items which do not seem to fit and any apparent gaps in the plan. Place the action steps into a possible sequence for implementation.

XI. The final step is to plan a way of evaluating the effectiveness of the action program as it is implemented. If Step II (Situation B) has been described in clear and specific terms, developing an approach for monitoring, describing and measuring progress toward goal attainment need not be difficult.

NOW YOU ARE READY TO BEGIN TO IMPLEMENT YOUR PLAN!

UNIT 3

Training Program Design and Evaluation



UNIT III. TRAINING PROGRAM DESIGN AND EVALUATION

The major purpose of this unit is to enable participants to design training programs which will meet established learning needs and which will be appropriate for adults.

Upon completion of this unit, participants will:

1. Be able to define the five steps in the design of a training program.

2. Be able to define the steps and methods involved in conducting needs assessments for training.

3. Be able to define the three components of an adequate learning objective.

4. Given a CIDS training problem, be able to write adequate learning objectives.

5. Be able to select training activities which address three types of learning objectives.

6. Given a set of learning objectives, be able to select an appropriate evaluation method.

ISSUES IN DEFINING A "TRAINING" NEED
(FROM DR. ROBERT MAGER)

I. HE ISN'T DOING WHAT HE SHOULD BE DOING. I think I've got a training problem.

1. What is the performance discrepancy?

   Why do I think there is a training problem?

   What is the difference between what is being done and what is supposed to be done?

   What is the event that causes me to say that things aren't right?

   Why am I dissatisfied?

2. Is it important?

   Why is the discrepancy important?

   What would happen if I left the discrepancy alone?

   Could doing something to resolve the discrepancy have any worthwhile result?

3. Is it a skill deficiency?

   Could he do it if he really had to?

   Could he do it if his life depended on it?

   Are his present skills adequate for the desired performance?

II. YES IT IS A SKILL DEFICIENCY. He couldn't do it if his life depended on it.

4. Could he do it in the past?

   Did he once know how to perform as desired?

   Has he forgotten how to do what I want him to do?

5. Is the skill used often?

   How often is the skill or performance used?

   Does he get regular feedback about how well he performs?

   Exactly how does he find out how well he is doing?

6. Is there a simpler solution?

Can I change the job by providing some kind of job aid?

Can I store the needed information some way (written instructions, checklists) other than in someone's head?

Can I show rather than train?

Would informal (i.e., on-the-job) training be sufficient?

7. Does he have what it takes?

Could he learn the job?

Does he have the physical and mental potential to perform as desired?

Is he over-qualified for the job?

III. IT IS NOT A SKILL DEFICIENCY. He could do it if he wanted to.

8. Is desired performance punishing?

What IS the consequence of performing as desired?

Is it punishing to perform as expected?

Does HE perceive desired performance as being geared to penalties?

Would his world become a little dimmer (to him) if he performed as desired?

9. Is NON-performance rewarding?

What is the result of doing it his way instead of my way?

What does he get out of his present performance in the way of reward, prestige, status, jollies?

Does he get more attention for MIS-behaving that for behaving?

What event in the world SUPPORTS (rewards) his present way of doing things? (Are you inadvertently rewarding irrelevant behavior while overlooking the crucial behaviors?)

Is he "mentally inadequate", so that the less he does

the less he has to worry about?

Is he physically inadequate, so that he gets less tired if he does less?

10. Does performing really matter?

Does performing as desired matter to the performer?

Is there a favorable outcome for performing?

Is there an undesirable outcome for NOT performing?

Is there a source of satisfaction for performing?

Is he able to take pride in his performance, as an individual or as a member of a group?

Does he get satisfaction of HIS needs from the job?

11. Are there obstacles to performing?

What prevents him from performing?

Does he know WHAT is expected of him?

Does he know WHEN to do what is expected of him?

Are there conflicting demands on his time?

Does he lack the authority?
...the time?
...the tools?

Is he restricted by policies or by a "right way of doing it" or "way we've always done it" that ought to be changed?

Can I reduce interference by improving lighting?
...changing colors?
...increasing comfort?
...modifying the work position?
...reducing visual or auditory distractions?

Can I reduce "competition from the job"--phone calls, "brush fires", demands of less important but more immediate problems?

IV. WHAT SHOULD I DO NOW?

12. Which solution is best?

Are any solutions inappropriate or impossible to implement?

Are any solutions plainly beyond our resources?

What would it "cost" to go ahead with the solution?

What would be the added "value" if I did?

Is it worth doing?

Which are we best equipped to try?

Which remedy interests us most? (Or, on the other side of the coin, which remedy is most visible to those who must be pleased?)

IDENTIFICATION OF TRAINING NEEDS: TECHNIQUES AND METHODS FOR IDENTIFYING TRAINING NEEDS

1. TESTS AND EXAMINATIONS

These are designed to assess the current level of knowledge or skill that an employee has. A gap between what is desired and what exists will indicate who needs training, what training and how much training. Here one finds difficulty in constructing measurement instruments that are reliable and will measure what is intended.

2. FORMAL AND INFORMAL OBSERVATION OF PERFORMANCE

The supervisor, by observing subordinates perform their jobs, can identify training needs. A deficiency in the performance of a task may mean remedial training. This technique is essential for on-the-job training. Training for supervisors may be necessary so that they know how to evaluate what they see and how to correct the deficiency.

Observation of performance can be used to identify those employees who, if they receive additional training, can advance in the organization.

3. INTERVIEW WITH EMPLOYEES AND GROUP CONFERENCES

When an operating problem occurs or when a performance deficiency appears, the supervisor talks with the employees involved to find out the degree of importance and what steps are necessary to restore the desired results. Involvement of employees is necessary to assess training needs.

Through the interview process, the employee may see the need on his own and suggest methods of correcting the weakness.

4. LEGAL MANDATE

Some of our training needs have been identified for us. Legislation sometimes mandates certain topics or a certain amount of time for staff training. Compliance with the law generated a high priority training need.

5. PERFORMANCE APPRAISAL

A periodic appraisal gives clues to the strengths and weaknesses of employees. The gap between actual performance and desired performance will be a training need.

Self-appraisal and self-recognition of weakness and the desire to overcome them are the first steps in an effective training process.

6. QUESTIONNAIRES, SURVEYS AND CHECKLISTS

A list of possible programs or the steps involved in job tasks is circulated among staff. The employee indicates the area in which he feels he needs more knowledge or additional skill. The responses will indicate who desires training and of what type.

There is a trend toward asking employees what the needs of their supervisors and subordinates are. Many times we find an "I don't need anything but my subordinates do" attitude.

The instruments used should indicate the degree of urgency in fulfilling each need.

These techniques are relatively inexpensive and can be used to survey large numbers of employees in a short period of time. Beware of the tendency of employees to select something because it sounds nice.

7. REQUESTS FROM MANAGEMENT

Requests from management personnel will often indicate perceived training needs. What the person making the request may see could, in reality, be a problem, not a need. Further examination is always necessary. Beware of vested interests and the tendency to "oil the hinge that squeaks."

8. TASK ANALYSIS

What are the tasks an employee must perform? What are the steps involved in each of the tasks? What knowledge, skill, or attitude is necessary to perform each of the steps? What equipment is used? What is the degree of learning difficulty associated with each of the steps?

Who will need the knowledge, skill, attitude? When will they need it?

9. TRAINING ADVISORY COMMITTEES (PARTNERSHIPS)

A committee can help identify and analyze problem areas, determine who needs training, decide what training is needed, and evaluate which training program fills the need. The committees can be helpful in determining priorities. If key people are involved, the advantages are numerous.

10. UNIVERSITY OR OTHER CONSULTANTS

You can contract out the training function, including the assessment of training needs. Remember that it will take an outsider time to learn the ins-and-outs of the operation. Consultants are also available to conduct pilot studies.

11. ECLECTIC APPROACH

This combines a multitude of techniques to assess training needs but is time-consuming and sometimes expensive. Still, this is probably the best approach for assessing training needs.

ADDITIONAL POINTS TO CONSIDER

1. AVAILABILITY OF PROGRAMS

Many "canned" training programs are available, and the mail will bring announcements of new programs.

The tendency is to say "That sounds like an interesting program, let's send someone." This approach puts the cart before the horse. Once training needs are assessed and objectives set forth, the training manager may review the available programs.

2. AWARENESS OF NEW TECHNOLOGY, KNOWLEDGE, ATTITUDES

Training to prevent obsolescence or for behavior modification can be generated by these external variables. The question should be asked if the organization can use the new technology, knowledge, attitudes. If so, how and for whom?

3. DESIRE TO FOLLOW THE PRACTICES OF OTHER AGENCIES

Other organizations have developed sound training programs based on their identified needs. Beware of adopting a program for which

you haven't identified needs just for the sake of keeping up with the town of Jonesboro

4. IDENTIFICATION OF OPERATING PROBLEMS

Much of what we do is reactive rather than proactive. There has been a tendency to conduct training in an effort to correct the crisis. The trainer must first find out why the crisis occurred.

Once operating problems are properly analyzed, it may be found that training is not the answer.

Adapted from "Assessment of Training Needs," Edwin C. Leonard, Midwest Intergovermnental Training Committee, The U.S. Civil Service Commission, Fort Wayne, Indiana, 1974.

LEARNING OBJECTIVES TABLE

	KNOWLEDGE LEARNING	SKILL LEARNING	ATTITUDE LEARNING
1. OBSERVABLE BEHAVIORS	List, describe, state, report, discuss, debate, critique, etc...	Demonstrate, role-play, lead, perform, solve, assemble....	Role play, discuss, touch, hold, smile, laugh, cry, approach, avoid....
2. PERFORMANCE LEVELS	Standards Seven out of ten, the major points, the importance of the five theories....	Standards Once, twice....seven out of ten, all the parts, the six steps, with no more than three errors, in ten minutes....	Standards Convincingly, comfortably unflinchingly....
	Judges To your own satisfaction, in the opinion of authorities, to my (instructor's) satisfaction, as judged by bosses, peers....	Judges To the satisfaction of peers, bosses, instructors, experts, yourself....	Judges To your own satisfaction, in the opinion of leaders, bosses, etc., as felt by whoever....
3. CONDITIONS	Permissions Given the article on, with aid of notes and materials....	Permissions Given the formulas, given the parts, given the situation, with aid of notes and materials....	Permissions In any way that seems natural, when you feel like it, if you feel free, feel free to....
	Restrictions Without aid of notes, without coaching, without the sample model....	Restrictions Without aid of notes, without coaching, without the sample/ model....	Restrictions Without talking, hitting, using your hands, moving away....

CREATIVE LEARNING OBJECTIVES

From your Force Field Analysis, please identify three performance deficits, one each for:

KNOWLEDGE: _____

SKILL: _____

ATTITUDE: _____

Using the Learning Objectives Table as a reference, write a learning objective for each of the three deficits above:

KNOWLEDGE: _____

_____

SKILL: _____

_____

ATTITUDE: _____

_____

DESIGNING EVALUATION STRATEGIES

Write a specific evaluation strategy for each learning objective:

KNOWLEDGE: _____

_____

_____

SKILL: _____

_____

_____

ATTITUDE: _____

_____

_____

METHODS PRIMER*

This section serves as an introduction to methods. There are so many methods in use today that it would take several books to describe them. Here some methods are described in enough detail that you can use them without special training. Others are merely sketched in to give you an idea of the possibilities. Since several of these methods require that the trainer have special skills, and since you are the best judge of your present level of competency, a skills rating is provided to assist you in assessing yourself. Some possible uses of the methods are indicated, as well as the participant activity/passivity implied by each one.

In some cases the groupings suggest derivation, in others merely kinship. The sequence of groups generally moves from methods that require little adultness on the part of the participants to those that require a great deal. Most important, this organizational arrangement is an attempt to span the universe of methods with the economy of ten groups. Not included are certain methods that border on therapy. If you want to add them, they start in Group Eleven. Others (not included) will hopefully fall into one of the ten groups. When you run into new methods, see if you can fit them into this organizational scheme. If not, design your own scheme. The important thing is to have a scheme; without one you may be overwhelmed by the numbers.

GROUP ONE: PRESENTATIONS

These methods are vehicles for providing information. For most part they are appropriate only for knowledge learning. When participants lack content background, these methods may serve as the simplest and best way of providing it. They may also put participants to sleep.

1. LECTURE
A prepared verbal exposition by one speaker before an audience. Though often long, a lecture provides a great deal of information quickly. Requires total participant passivity.
Skills Rating - speaker should be interesting.

2. LECTURETTE
A short lecture. Puts fewer participants to sleep.
Skills Rating - requires more discipline than the lecture.

3. LECTURE-FORUM
A lecture followed by the old question/answer period. Provides more activity for participants and gives them a chance to explore selected portions of the content in greater detail.
Skills Rating - a good traffic cop.

4. PANEL
A planned conversation before an audience on a selected topic.

*Author unknown

Usually includes three or more panelists and a leader. Brings more points of view to the content. Participants are passive.
Skills Rating - leader who is diplomatic.

5. PANEL-FORUM
A panel followed by the habitual question/answer period chaired by the leader. A bit more participant activity and exploration. Can lead to special interest arguments.
Skills Rating - leader should have some way of organizing the interactions.

6. EXPANDING PANEL
A panel with a vacant chair(s). Participants can join in when they feel the call and vacate when they've had their say. Gets unwieldly with groups larger than twenty. Can provide color and a fair amount of participant activity, since even those who don't join in think about it.
Skills Rating - a leader with a solid set of ground rules and the skill to enforce them.

7. DEBATE
An organized argument. Often more intense than the above methods. Control is up front. Participants passive except for hissing and applause.
Skills Rating - low for legislatures, high for law schools.

8. PRESENTATION
Includes all kinds of "dog and pony shows." Control is up front. Participants passive.
Skills Rating - something more than a desire to "show off."

9. FILMS
Presumably for content as well as entertainment. Many involve attitude learning as well as knowledge learning. Turning off the lights provides a good opportunity for naps. Participants remain passive unless vicariously involved.
Skills Rating - ability to choose from among many bad films.

10. SLIDE SHOWS
Ad addiction of world travelers.

11. PREPARED VIDEOTAPES
Have an advantage over movies in that lights remain on. Flexible start and stop for discussion purposes. Can make them yourself.
Skills Rating - no particular skills, but you will need a videotape player and sufficient monitors.

12. PRESENTATION WITH LISTENING TEAMS
Any of the above presentation methods followed by a more organized kind of question/answer period. Before the presentation participants are organized into small groups. Each group is given a listening assignment, e.g., listening for points that are debatable, points that have current applications, etc. At the end of the

presentation, the groups caucus and develop questions relating to their particular assignment. The questions are posed to those making the presentation.
Skills Rating - ability to structure assignments that will get at the meat of the presentation.

13. PRESENTATION WITH REACTION PANEL
Any of the above presentation methods followed by the reactions of a small, selected group of participants. This participant panel is in effect reacting for the entire group.
Skills Rating - ability to select participants whose views are likely to represent the views of several other participants and the courage to try for a cross-section of views.

GROUP TWO: DEMONSTRATIONS

These methods are vehicles for modeling "correct" techniques or procedures. They are used almost entirely for skills learning. They assume a relative lack of participant proficiency. They may or may not include participant activity.

1. DEMONSTRATION
An activity in which one or more people "show how it is done." If participants are passive, this method is notoriously ineffective for improving participant skills. The extension service uses it extensively, however, to change attitudes. By demonstrating the profitability of a given procedure, they are effective in gaining an attitude of acceptance from the farmers they serve.
Skills Rating - the skill to show correct procedure without offending.

2. DEMONSTRATION WITH PRACTICE
A demonstration followed by an opportunity for participants to try their hands at it. One of the best means for learning simple skills, provided feedback follows immediately upon completion of the procedure. Without performance feedback, the participant is likely to be reinforced in doing it incorrectly.
Skills Rating - ability to break procedure down into simple communicable steps. Ability to provide helpful feedback, helpfully. Patience.

3. DRY RUNS
As nearly as I can make out this is different words for the above method.

4. COACHING
Providing tips for improving performance. Often follows a demonstration or includes minidemonstrations as a corrective break in participant performance. Retains all kinds of up front control, to say nothing of power.
Skills Rating - ability to coach, not grouch. Skill in the assigned procedure.

5. REHEARSALS
Practice just prior to application. May involve practicing a sequence of separately learned simple skills using methods above. Participants active. Control in hands of "director."
Skills Rating - roughly the same as in coaching. Depending on the activity, may require a "bull-horn" voice.

6. DRILLS
Skills practice involving repetition. Sometimes boringly participant active. Unpleasant childhood experiences involving drills may make adults uncomfortable with this method.
Skills Rating - ability to get participants to try and try again. Sometimes accomplished by telling the Patient Spider story.

7. PUZZLES
An interesting variation in which the skill is not demonstrated but is learned from successfully solving the puzzle. Participants are highly active.
Skills Rating - benevolence.

8. SKILLS PRACTICE LAB
May be combined with any of the above methods. It involves the information of small participant groups, often participant selected, for the purpose of practice and mutual feedback.
Skills Rating - ability to "turn loose" and act only as a resource.

GROUP THREE: READING

These methods are information vehicles. For the most part they are appropriate only for knowledge learning. When participants are lacking in background knowledge, these methods may serve as simple and direct ways of providing it. If participants read the material, they may be active in critiquing it. Up front control is somewhat restricted since "who knows what goes through their heads" while they are reading.

1. INDIVIDUAL READING
A tried and true method by no means outdated.
Skills Rating - requires skill to select relevant material. Requires reading skill on part of participants.

2. READ AND DISCUSS
Normally takes the form of a short reading assignment followed by a small group discussion. More participant active than individual reading. More up front control possible if leader is assigned to discussion group.
Skills Rating - same as above.

3. READ AND REPORT
Individuals are assigned to read different materials and to report the meat of them back to the group. Requires more participant adultness than above methods and greater reading and digesting skills. Up front control is shaky unless leader is prepared to

fill in after participant reports.
Skills Rating - requires skill in getting participants to accept the assignment.

4. READING ALOUD
Charming.

GROUP FOUR: DRAMA

The methods in this group present information that may often be debated. They are primarily appropriate for knowledge learning, though attitudes may also be involved. These methods may serve as a means of stimulating participant contributions later, or may involve participants in the drama as it is happening.

1. SKITS
Short, rehearsed portrayals that make a point. Often trigger discussion. Participant passive, except for giggles.
Skills Rating - "ham."

2. PANTOMIME
Short, non-verbal portrayals often used in guessing games. Engages participants more than skits. Useful for warm-ups when participants are volunteered as players.
Skills Rating - ability to keep mouth shut.

3. GUERRILLA THEATER
A contemporary offshoot of the methods above. Works something like jazz in that players normally use a script that describes only basic action and ad-lib the rest. Is noted for getting participants spontaneously caught up in the action.
Skills Rating - courage and ability to soothe ruffled participants.

GROUP FIVE: DISCUSSIONS

These methods give participants an opportunity to derive information. In a less adult form, they are often used to manipulate assimilation of information. For the most part these methods are appropriate for knowledge learning. In more experienced hands they can also provide a means for attitude learning. The assumption is that participants have something to contribute.

1. GROUP DISCUSSION
An open discussion of a given topic by a relatively small group. May or may not have assigned leader or time limit. Participant active. Appointed group leaders may retain some control.
Skills Rating - skill in giving instructions that will get discussion going and keep it on target.

2. GROUP BUZZES
Usually short discussions of a given topic, set time limit, no leader. Normally relatively small groups of three to five

participants. May be quickly formed ("Pick four other people close to you") as more personal divisions of larger groups. Usually groups are asked to report conclusions back to the large group.
Skills Rating - ability to give clear, crisp instructions.

3. BRAINSTORMING
A method of problem solving (or listing) in which group members suggest in rapid-fire order all the possible solutions (or problems) they can think of. Criticism and discussion are ruled out while suggestions are being made. Often has set time limit. Evaluation follows the listing. Intensely participant active. More ideas and a wider range of ideas than generated by a typical discussion.
Skills Rating - the ability to clearly communicate the ground rules and enforce them. Often requires describing ground rules in detail. May want to state them twice, slowly and distinctly. Ability to give permission to "far out" ideas.

4. DIAGNOSTIC SESSIONS
Small groups formed for the purpose of diagnosing a problem, situation, process, etc. Ideally, the group should agree on a way of establishing cause/effect relationships, such as looking for evidence, reality-testing, etc.
Skills Rating - ability to help the group establish criteria.

5. BULL SESSIONS
Highly informal discussions that often tangentially relate to the learning. The random pattern of discussion often yields new insights and serves to transfer or apply learning more honestly to back home situations. In addition to the numerous sessions that naturally occur, space for them may also be planned into the design. They serve for emotional unwinding.
Skills Rating - if trainer enters in, needs ability to let his hair down and become one of the boys.

GROUP SIX: CASES

The methods in this group provide simulated situations drawn from real life which give the participant an opportunity to apply previously learned knowledge. In use they constitute a kind of test, but one that requires judgement in the application of knowledge rather than simple regurgitation. These methods are highly participant active, but a high degree of up front control may be retained through various means.

1. CASE STUDY
An account of a problem situation including sufficient detail to make it possible for groups to analyze the problems involved. The case is a slice of life that invites diagnosis, prescription, and possible treatment. As such it may focus on problem-solving skills as well as knowledge. Up front control is often maintained by loading the dice, i.e., the details of the case lead to correct judgements. Other cases are totally open to differences in judgement.

Additional control may be exercised by an assigned leader directing the analysis with "Socratic" questions. There are many packaged cases that can be purchased and used with a little rehearsal. Often, however, they don't fit your needs. In that case, after participating in a few, you can satisfactorily design your own. Simply sit back, take a look at the world around you, and describe a problematic piece of it.
Skills Rating - requires both knowledge and skill needed to solve the problem. May require the skill to design your own case study. Questioning skills of a Socrates are also useful.

2. MINI-CASE
A case study in miniature; perhaps the most versatile and useful method of all. After a lecture, film, reading, discussion, etc., mini-cases may be used as a quick check on understanding. A good way to do this without putting any single person on the spot is to divide the group into three's, read the mini-case aloud so that all sub-groups can hear, allow sub-groups two to five minutes to discuss the problem privately, and then go around the room asking each sub-group to state its conclusions. You should pick up all answers before allowing discussion. You may then reinforce the better answers, or if something crucial was missing from all answers, you can supply it. In addition, the mini-case may be used in needs assessment, and as an excellent means of practicing the application of certain knowledge (e.g., company policy) to real life situations. For this use it is preferable if the case has no one right response.
Example: "You are conducting a workshop. Participants are all present. The big chief was supposed to say his bit at 9:00. It is now 9:20. He has not appeared. Participants are getting restless. What would you do?"
As you can see in this example, there are several points to consider: 1) is his "bit" crucial to the learning?, 2) will he be offended if you begin without him?, 3) are participants likely to be negative to the entire workshop as a result of this delay? Judgement is required to respond to the situation; there may be several right answers. From the example, you can see how easy it would be to write your own mini-cases. It is not important that they be true, only that they be plausible.
Skills Rating - anybody can play, provided the mini-cases are relevant to the learners experience.

3. CRITICAL INCIDENT
A small piece of a case that states only the most important or most dramatic transaction.
Example: "Well, you can all eat rotten apples!" shouted the girls' P.E. teacher as she stormed out of the faculty meeting. Shortly thereafter, the music teacher left.
It is then up to the participants to play detective; to come up with enough information to resolve the conflict or problem. The workshop leader has all the data but shares it only in response to direct questions. In this method the skill of getting at the roots of the problem is more important than the knowledge needed to solve it. This method may be merrily participant active. Control is exercised by the structure of the data and the fact that

the leader has it all. In using the method, larger groups can be divided.
Skills Rating - with some of the packaged examples, the skill needed is high. But for example, homespun ones, the beginner can do just fine provided that the case is not embarrasing by being too close to the truth.

4. IN-BASKET
A form of the case study in which letters, memos, phone-messages, etc., are given to the participant playing an assigned role. He is then given time to write actual responses to the items in his in-basket. A cast of characters is provided along with a stated situation, such as "You have been on a business trip. It is Saturday. You decided to drop by the office and spend an hour cleaning off your desk." Each participant is then given an envelope (all envelopes contain the same items) and told that he has one hour to respond in writing to the contents. There are often enough items to provide a time pressure. He is provided with pencil and tablet. After the time has passed, participants form groups to discuss their work. Control can be maintained by assigning a leader to each group.
Skills Rating - knowledge of company policy and ability to critique responses.

GROUP SEVEN: GRAPHICS

The methods in this group are used primarily for warming up and building group cohesion. They involve attitude learning and in some cases knowledge. They are essentially non-threatening but they require a good deal of participant self-direction. They assume no particular knowledge or skills on anyone's part.

1. DOODLING
The method participants use when they are bored.

2. PORTRAITS
Rough drawings of the way participants see one another for "getting to know you" activities. Surprisingly, these seldom are embarrassing, and thus require only a modicum of leader skill. Self-portraits are even easier. Portraits may also be used as a means of provoking thought. Participants can be asked to draw their thoughts on a particular topic. Or they may be asked to draw a picture of their organization, family, etc.
Skills Rating - the ability to refrain from being an art critic.

3. GROUP PAINTINGS
Everyone smears finger paint or tempera on the same paper. Reveals hidden depths and imagine the fun!
Skills Rating - the ability to recover your dignity.

4. GROUP COLLAGE
Similar to the one above, but participants use magazine cutouts and paste.

GROUP EIGHT: PLAYLIKES

These methods allow participants to practice behaviors that involve a complex combination of skills in situations similar to ones back on the job. Though they are primarily used for skills practice, they may also be used for attitude learning. These methods may require a good deal of adultness on the part of participants and a great deal of skill and understanding on the part of the leader. The participant must also have sufficient knowledge to enable him to play-act the behavior. These methods may employ a variety of structures, such as diads, triads, and fishbowls.

1. ROLE PLAY
An unrehearsed, dramatic enactment of a response to a situation or human encounter involving one or more persons in "playing like." Role play may be used for the purpose of situation analysis or to provide feedback to the player about his own behavior. They are particularly useful in practicing communication skills when no single right answer will measure the attainment of the desired behavior. Participants may either choose or be assigned roles. Roles may be written or merely outlined by the leader; they may be mostly specified or open to ad-lib.
Skills Rating - requires skill in getting participants to accept roles, in creating a climate of trust, in keeping them doing rather than saying. Requires the sensitivity to stop the role play when it is threatening, silly, or over-dramatic. Requires the skill to help the group process their feelings and to provide helpful feedback.

2. MINI-ROLE PLAY
Relates to the role play in the same way as the mini-case related to the case. May also be used in many of the same ways.
Skills Rating - same as above.

3. PLAY YOURSELF
Commonly role play involves acting out a fictitious person; in this one you play yourself in a fictitious situation but preferably one close to real life. Very useful in practicing skills required back on the job.
Skills Rating - same as above.

4. ROLE REVERSAL
You play me, and I play you. And hopefully we gain a bit more respect for each other. Participants need a lot of adultness for this one. Can become hostile. When I see how you see me, I may be shook for weeks.
Skills Rating - only very experienced practitioners should attempt to use this method.

5. MIRRORING
While two or more participants engage in a role play, other participants may spontaneously enter in by moving beside one of the

players and translating what he says into what he means. This means that someone in effect plays the part of someone else's alter ego. In this method, participants need a good deal of maturity.
Skills Rating - very experienced practitioner with a good working knowledge of human psychology.

6. MOVIE
This amounts to the role play of an anticipated situation assisted by a leader who plays movie director, yelling such things as "cut," "role it," "more_____," or "less_____." Very useful in rehearsing workshop leaders, teachers, social workers, personnel interviewers, etc.
Skills Rating - all those described above, plus the willingness to get in there and "bleed" in order to help the participant get it right. You may find yourself crawling on your knees toward the participant saying, "Again...Again! Again!" And you had best be able to jump to your feet, clap your hands together, and shout, "That's it!" when he does it. And you'd _____well better mean it!

7. VIDEOTAPE FEEDBACK
Taping any of above so that participants may judge their own performance. A very strong method.
Skills Rating - if feedback is limited strictly to that provided by the screen, the leader need not be as skilled as in many of the methods above. If it is to be used more actively, e.g., stopping it to point out particular mannerisms, responses, etc., all the above skills are required.

8. SOCIAL SIMULATIONS
Essentially amount to multiple, simultaneous role-plays. They range from very sophisticated packages to loose "general scenes" constructed by the practitioner himself. Either way, written roles and situational details trigger interactions similar to real life.
Skills Rating - good, assertive, fun direction-giving ability. Depending on the simulation other skills may be needed.

GROUP NINE: GAMING

The methods in this group are designed to intensely involve the participant. They are used for knowledge application and skills practice in problem-analysis, decision-making, problem-solving, etc. The intensity is achieved by including a high degree of competition in the learning. Devotees of these methods feel that competition is one of the strongest human drives -- whether for good or bad -- and that by tapping it, these methods achieve the highest level of experiential learning.

1. WAR GAMES
Ask the Army.

2. BUSINESS GAMES
Check with Harvard.

3. SIMULATION GAMES
Similar to social simulations but with carefully arranged competitive elements. Gobs of computerized model-building goes into the creation of the games. They are all packaged by professionals. If you want to learn how to design them yourself, you need to spend some time at special workshops planned for this purpose.
Skills Rating - if you buy a packaged one, you will need to spend days poring over the rules and weeks practicing directing it. The simpler course is to hire a consultant specialized in the particular game that you choose.

GROUP TEN: PARTICIPANT DIRECTED INQUIRY

The purpose of these methods is to involve the participant completely in his own learning. They are highly participant active, retaining no up front control.

1. MUTUAL INQUIRY
A group of people sit down without assigned leadership to plan a series of learning activities for their own use, then carry them out. This is the simplest, most adult, and most difficult of all methods.
Skills Rating - humility based on deep respect for participants.

2. LEARNING/TEACHING TEAMS
The above group with the additional purpose of teaching someone else what they learn.

WARM-UP METHODS

As stated earlier, warm-ups are essential in the morning and right after lunch. Though they tend to be fun (even gamey), they should be in some way related to the objectives of the learning.

For short workshops (one day or less) warm-ups should last no longer than ten or fifteen minutes; for long workshops (when the group will be together for many days) warm-ups may need to last an hour or more, particularly the first day.

I do not intend to spell out methods for your use. Rather, you should use the ingredients described here to "mix up" your own. These are the best warm-ups.

INGREDIENTS:

1. Sign-board materials for hanging from the neck and advertising yourself. Many contain information like:
"When I smell onions, I_____."

"On my way to the workshop_____."
"When I am in a new group_____."
"What I expect from this workshop is_____."
"I am happiest when_____."

2. Art materials for expressing self in some of the following ways:
   Group Drawings
   Group Paintings
   Collages
   Life-Story Comic Strips
   Peak-Experience Doodles

STRUCTURES

Following is a list of some of the forms around which learning activity is built; the ingredients of its architectural superstructure. As such, they suggest ways in which participants and learning resources may be combined and arranged to support learning activities. These are by no means all possible structural forms; feel free to add to the list.

INDIVIDUAL STRUCTURES

An individual:
- on a chair.
- behind a table.
- on the floor.
- facing a speaker.
- facing a participant.
- facing a book.
- facing a programmed text.
- isolated in an audience.
- looking out the window.
- back in his room.
- in consultation with staff.

SMALL GROUP STRUCTURES

More and more, small groups are becoming the main structure for serious adult learning. Large groups are being relegated to entertainment and public relations. It is usually possible to break large groups into small ones for more effective interaction while learning. Here are some small group structures.

1. DIADS - participant pairs

2. TRIADS - participant threesomes

3. QUADRADS - may be formed from two diads

4. ETC. - on up to twelve participants

5. FISHBOWLS - participants seated in a circle around some learning activity, such as a role-play

6. GROUP-ON-GROUP - one group surrounded by another; the second group often observes the first.

7. CIRCLES - a group seated in a circle

8. SQUARES - a group seated in a square

9. TABLE GROUPS - a group around a table

10. COMPETING GROUPS - breaking larger groups into competing sub-groups

11. COLLABORATING GROUPS - as above

12. LINES - small groups in a line

STAFF STRUCTURES

1. UP FRONT - staff in front (or center) of room

2. WITHIN GROUPS - providing content or facilitating the learning process

3. AVAILABLE - staff members available to groups (or individuals) for consultation or facilitation

4. NOW-YOU-SEE-THEM/NOW-YOU-DON'T - staff members who do their bits and split, leaving no time for questions

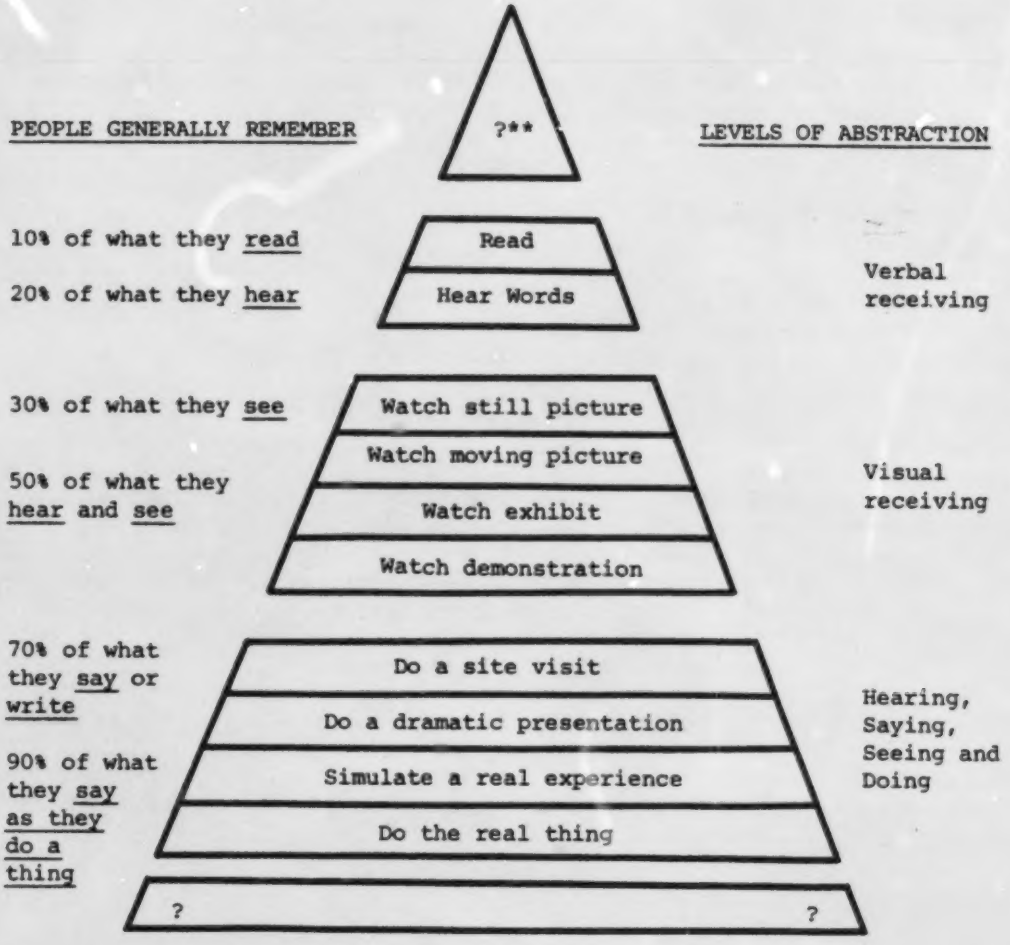
5. OUT FRONT - staff acting as hosts/hostesses

6. IN BACK - staff observing the process for the purpose of providing feedback to group(s) or up-front staff

7. FACULTY - individual staff members conducting separate sessions simultaneously

DALE'S CONE OF EXPERIENCE*

Below is a diagram of Dale's Cone.



*See Wiman & Mierhenry, Educational Media, Charles Merrill, 1969, for reference to Edgar Dale's "Cone of Experience."

**Question marks refer to the unknown.

CHOOSING TRAINING METHODS

Design a method(s) which would achieve each of your three learning objectives:

KNOWLEDGE: _____

_____

_____

_____

_____

_____

_____

SKILL: _____

_____

_____

_____

_____

_____

_____

ATTITUDE: _____

_____

_____

_____

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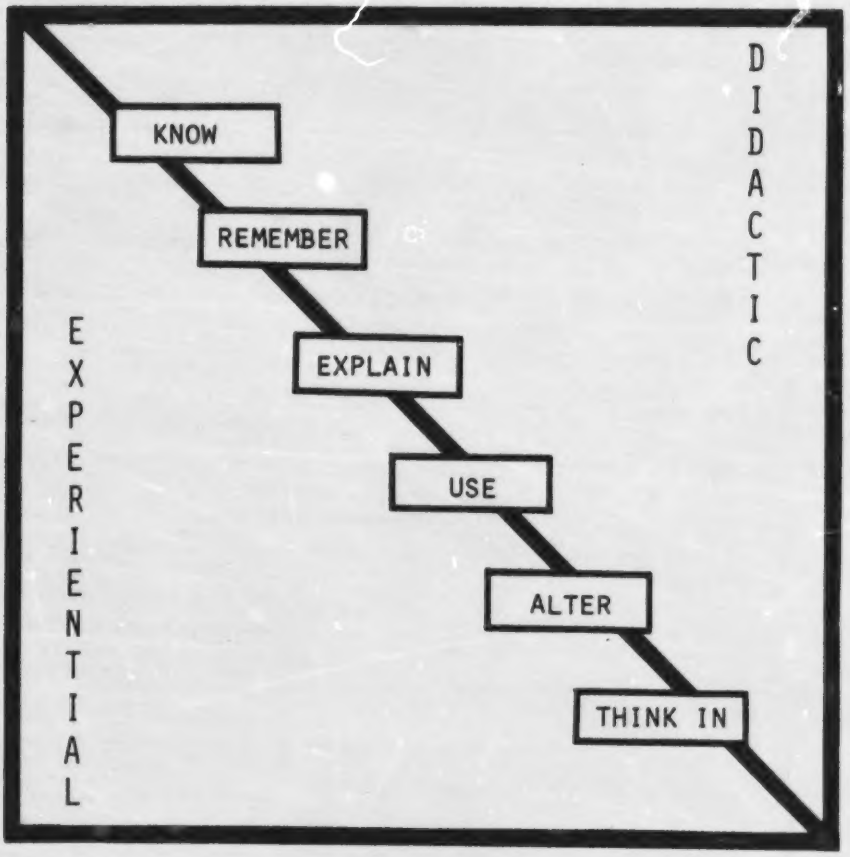
_____

_____

_____

CONSIDERATIONS ON THE "BLEND" OF TRAINING METHODS



There are two basic criteria for deciding on the "mix" of activities in a training session:

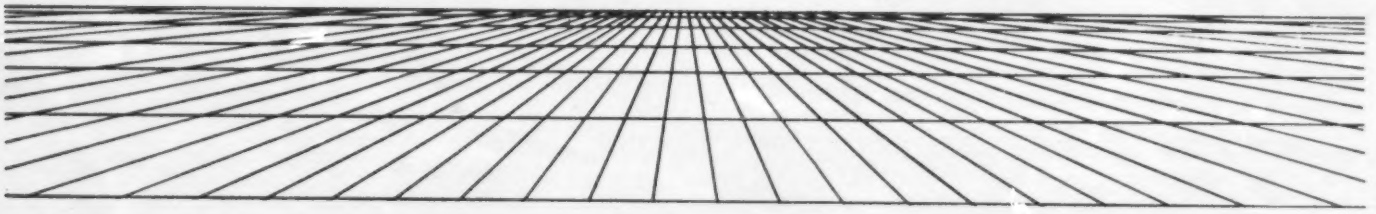
1. Utility: How the learner will use the learning.

2. The nature of the learning itself.

NOTES:

Adapted from Bell and Margolis, Training and Development Journal, August, 1978.

UNIT 4
Conducting Training



UNIT IV. CONDUCTING TRAINING

The major purpose of this unit is to improve the participants' ability to utilize a systematic approach to conducting successful adult learning activities.

Upon completion of this unit, participants will:

1. Be able to list and describe the five major steps involved in conducting a successful adult learning activity.

2. Given the resources of the group, be able to identify and to some extent resolve areas of confusion or difficulty with implementing training.

TRAINING SESSION CHECK LIST

	Check items to take	Check when completed	Check things to do, items to get	Check when completed
CREATURE COMFORTS - HUMAN ENGINEERING				
1. Notify people of exact time and location including room numbers				
2. Provide maps if necessary				
3. Make room arrangements				
4. Check number and size of room				
5. Check air-conditioning and heating in rooms, can it be individually adjusted				
6. Is room free from distraction and noise				
7. Will your session disturb others				
8. Availability and exact location of restrooms				
9. Availability and exact location of coffee, cokes, water, snacks				
10. Are there sufficient ashtrays				
11. Scheduled breaks				
12. Availability and exact location of places to eat				
13. If necessary, have eating arrangements been made				
14. Availability and exact location of overnight accommodations				
15. Overnight reservations made, for myself, others, if needed				
16. All Co-trainers notified				

	Check items to take	Check when completed	Check things to do, items to get	Check when completed
EQUIPMENT				
17. Movie Projector				
18. Stereo				
19. Slide Projector				
20. Overhead Projector				
21. Screen				
22. Camera				
23. Video Tape Recorder/Player				
24. Tape Recorder				
25. Chart Pak				
PARTICIPANT MATERIALS				
26. Program announcements				
27. Agenda				
28. Pre-workshop mailout materials				
29. Participant list				
30. Small group list				
31. Participant packets, notebooks, workbooks, manuals				
32. Handouts, role plays				
33. Paper, note pads				
34. Pens, pencils				
35. Other necessary materials for participants				

	Check items to take	Check when completed	Check things to do, items to get	Check when completed
TRAINING MATERIALS				
36. A smile and positive attitude				
37. Trainer's manual or outline for session				
38. Films				
39. Slides				
40. Video tapes				
41. Music				
42. Magic markers, pencils, pens				
43. Prepared overheads				
44. Prepared flip charts, graphs, outlines, etc.				
45. Blank overheads				
46. Chart pak paper pads				
47. Masking and/or Scotch tape				
48. Scissors				
49. Glue, paste				
50. Small sheets of paper, or index cards				

NOTES: FIVE MAJOR STEPS INVOLVED IN CONDUCTING TRAINING

1. CLIMATE SETTING:

2. PRESENTATION OF STIMULUS MATERIALS:

3. PARTICIPANT INVOLVEMENT WITH MATERIALS:

4. FEEDBACK ON PERFORMANCE:

5. PARTICIPANTS PROCESS WHAT HAPPENED:

THE TRAINER

When conducting training, a trainer should:

1. _____

2. _____

3. _____

4. _____

5. _____

When conducting training, a trainer should not:

1. _____

2. _____

3. _____

4. _____

5. _____

NOTES:

_____

_____

_____

_____

_____

_____

_____

_____

The five 'shoulds' which my group agreed upon are:

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

The five 'should nots' which my group agreed upon are:

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

Other 'shoulds' or 'should nots' which I became aware of during group discussion:

_____

_____

_____

_____

_____

NOTES: TRAINER INTERVENTIONS

1. What is a trainer intervention?

_____

_____

_____

2. Why and when should a trainer intervene?

_____

_____

_____

3. Components of analysis to determine whether a trainer should intervene or not include:

A. Red Light: _____

_____

B. Interpretation: _____

_____

C. Cause: _____

_____

1) trainer
2) trainee
3) content/task
4) environment/climate

4. Examples of task interventions include:

5. Examples of climate interventions include:

6. Before a trainer makes an intervention:

   A. Is my interpretation of the Red Light clouded by assumptions or other things?

   B. Do I know what I want the intervention to accomplish?

   C. Is it likely to work?

   D. Does it fit with the ground rules established with the group?

   E. Is this an appropriate time to intervene in consideration of what is going on?

FEEDBACK

According to the NTL Reading Book, feedback is a way of helping another person to consider changing their behavior. It is communication to a person (or a group) which gives that person information about how he/she effects others. As in a guided missile system feedback helps an individual keep their behavior "on target" and thus better achieve their goals.

Some criteria for useful feedback:

1. It is descriptive rather than evaluative. By describing one's own reaction, it leaves the individual free to use it as he sees fit. By avoiding evaluative language, it reduces the need for the individual to react defensively.

2. It is specific rather than general. To be told that one is "dominating" will probably not be as useful as to be told that "just now when we were deciding the issue you did not listen to what others said and I felt forced to accept your arguments or face attack from you."

3. It takes into account the needs of both the receiver and giver of feedback. Feedback can be destructive when it serves only our own needs and fails to consider the needs of the person on the receiving end.

4. It is directed toward behavior which the receiver can do something about. Frustration is only increased when a person is reminded of some shortcoming over which he has no control.

5. It is solicited, rather than imposed. Feedback is most useful when the receiver himself has formulated the kind of question which those observing him can answer.

6. It is well-timed. In general, feedback is most useful at the earliest opportunity after the given behavior (depending, of course, on the person's readiness to hear it, the support available from others, etc.)

7. It is checked to insure clear communication. One way of doing this is to have the receiver try to rephrase the feedback he/she has received to see if it corresponds to what the sender had in mind.

8. When feedback is given in a training group, both the giver and receiver have an opportunity to check with others in the group on the accuracy of the feedback. Is this one man's impression or an impression shared by others?

Feedback, then, is a way of giving help; it is a corrective mechanism for the individual who wants to learn how well his behavior matches his intentions.

AIDES FOR GIVING AND RECEIVING FEEDBACK

1. Focus feedback on behavior rather than the person.

2. Focus feedback on observations rather than inference.

3. Focus feedback on description rather than judgement.

4. Focus feedback on descriptions of behavior which are in terms of "more or less" rather than in terms of "either - or."

5. Focus feedback on behavior related to a specific situation, preferable to the "here and now" rather than to behavior in the abstract, placing it in the "there and then."

6. Focus feedback on the sharing of ideas and information rather than on giving advice.

7. Focus feedback on exploration of alternatives rather than on answers or solutions.

8. Focus feedback on the value it may have to the recipient, not on the value or "release" that it provides the person giving the feedback.

9. Focus feedback on the amount of information that the person receiving it can use, rather than on the amount that you have which you might like to give.

10. Focus feedback on time and place so that personal data can be shared at appropriate times.

11. Focus feedback on what is said rather than on why it is said.

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